Org Managers and Authorized Signers

All existing agency/orgs must have a designated Org Manager and may have additional Authorized Signer(s). An Org Manager is a faculty or staff employee, who has overall responsibility for an agency/org. Details regarding an org manager’s responsibilities are discussed in FIN 203.

Approval signature(s) is required to add, change, and delete an org manager and/or authorized signer(s). In addition, the Advantage User ID for each approval signature must be included on the Advantage Form A so the Advantage Helpline can ensure that the person signing has the authority to approve the addition/change/deletion.

Establishing Org Manager and/or Authorized Signer(s) for a New Agency/Org

1. The requesting department completes an Advantage Form A and obtains an approval signature from the new org manager and a higher-level authority.
2. The department forwards the completed form, along with a complete new account application form to Financial Services.
3. Financial Services reviews the completed document(s) for completeness and accuracy,
4. Financial Services updates Advantage tables as deemed necessary and files ASU Advantage Form A document for updating/record retention purposes.

Adding, Changing, or Deleting an Org Manager and/or Authorized Signer(s) for an Established Agency/Org

1. The requesting department completes an Advantage Form A and obtains an approval signature from the present org manager, dean, director, chair, business manager, or higher-level authority.
2. The department forwards the form to the Advantage Helpline for updating of Advantage tables.

Required Approval

<table>
<thead>
<tr>
<th>Advantage Approval Matrix</th>
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<tbody>
<tr>
<td><strong>Situation</strong></td>
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<tr>
<td>Establishing org manager and/or authorized signer(s) for a new agency/org ²</td>
</tr>
<tr>
<td>Change in org manager ³</td>
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<tr>
<td>Change in org signer(s), other than org manager</td>
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</table>
1 The Advantage User ID for each approval signature must be included on Form A so the Advantage Helpline can ensure that the person signing has the authority to approve the addition/change/deletion.

Note: For org manager changes on sponsored project agency/orgs, certain additional approvals may be required. Consult your Office for Research and Sponsored Projects Administration site officer.

2 Also complete a New Account Application Form (see Financial References “Establishing Agency/Orgs”).

3 Indicate whether the previous org manager will remain an authorized signer on the agency/org(s).

Account Signer Changes and Additions for Multiple Entries

When adding, changing and/or deleting Org Managers or Authorized Signers on multiple Advantage Accounts, utilizing an electronic Excel spreadsheet will expedite your request. Utilizing an electronic spreadsheet automates the process by uploading the information directly to Advantage which reduces the manual processing time.

Complete the Multi-Signer Spreadsheet and provide the following information:

- Advantage account numbers
- Advantage user(s) ID
- Indicate if the individual(s) will be added or deleted from the specified accounts by placing an A or D in the respective column
- Indicate whether the individual(s) is requesting to be the org manager or a signer.

Once the spreadsheet is complete, please e-mail the electronic file to the Advantage Helpline.

A hard copy of the spreadsheet and the Advantage Form A will need to be submitted in addition to the electronic spreadsheet either via fax at 480-965-2625 or through campus mail to the Advantage Helpline, mail code 5812.

For additional questions please contact the Advantage Helpline at 5-2334 or your accountant in Financial Services.